



Overview

Certified Enrollment Entities have the ability to transfer consumer delegations between Counselors within their Entity without assistance from Covered California.

Transferring a Consumer

The Entity Primary Contact can transfer a single consumer or multiple consumers to a Counselor within the Entity.

From the “Delegations” drop-down menu, select the “Active Consumers” link to navigate to the **Active Consumers** page.

Customer Service 1-800-300-1506 | Online Chat | Help | My Security Profile | Logout | Secure Mailbox | Español |

CERTIFIED ENROLLMENT COUNSELORS - DELEGATIONS - ACCOUNT

Certified Enrollment Counselors

Refine Results By (reset all)

Certified Enrollment Counselors first name

Certified Enrollment Counselors last name

Status

☐ Active

☐ Inactive

Certification Status

Select

Certification Enrollment Counselor Renewal Date

From

MM/DD/YYYY

To

MM/DD/YYYY

GO

Pending Delegation Requests

Active Consumers

Inactive Consumers

	Number Of Clients	Certification renewal for Enrollment Counselor	STATUS	CERTIFICATION STATUS
Distro Test	1	10/15/2019	Active	Certified
Gregg Popovich	3	12/18/2019	Active	Certified

The **Active Consumers** page will display the complete list of consumers delegated to Counselors within the Entity.

A search for a specific consumer can be done by entering the consumer’s full first and/or last name in the “Consumer Name” box of the “Refine Results By” section on the left side of the page.



The Entity Manager can select one, or multiple consumers listed to transfer to a specific Counselor by placing a check mark in the box next to the Consumer Name and clicking on **CHANGE DELEGATION**

Customer Service 1-800-300-1506 | Online Chat | Help | My Security Profile | Logout | Secure Mailbox | Español |

CERTIFIED ENROLLMENT COUNSELORS ▾ DELEGATIONS ▾ ACCOUNT ▾

Active Delegations 2 Active Delegations(s)

To simultaneously change the delegations of more than one consumer from one Enrollment Counselor to another, click on the checkbox by the consumer's name, click on the **Change Delegation** button that appears and select the **Change Delegation** option. A pop-up will appear where you can search for the new enrollment counselor to whom the selected consumers should be re-delegated.

(1 Item Selected) **CHANGE DELEGATION**

Consumer Name	Active Since	Enrollment Counselor Name	Enrollment Status	Current Status	Action
<input type="checkbox"/> Charles Test	12/18/2018	Gregg Popovich			
<input checked="" type="checkbox"/> Mark Zuckerberg	12/17/2018	Distro Test			

The Entity Manager then receives a pop-up to search for the Counselor they wish to transfer the consumer delegation(s) to.

Please Note: The Primary Contact can select the “Search” button without entering any search criteria to receive a list of all counselors within the Entity.

Change consumer delegation to other Enrollment Counselor

Enrollment Counselor Email

Enrollment Counselor Name

Primary Site



After locating the Counselor, select the radio button next to their name. Select “Re-assign” to transfer the consumer delegation from one Counselor to another.

Search

	Enrollment Counselor Name	Email	Primary Site
<input checked="" type="radio"/>	Gregg Popovich	Gregg@invalid.com	Sacramento Response

Re-assign

The Entity Manager will then get a confirmation pop-up that the delegation has been transferred and re-assigned from one Counselor to the other.


1 consumers are now delegated to Gregg Popovich!

OK

Re-assign



This can be confirmed by looking at the **Active Delegations** page and noting the new Counselor delegated to the consumer.



Customer Service 1-800-300-1506 | [Online Chat](#) | [Help](#) | [My Security Profile](#) | [Logout](#) | [Secure Mailbox](#) | [Español](#) |

CERTIFIED ENROLLMENT COUNSELORS ▾DELEGATIONS ▾ACCOUNT ▾

Active Delegations 2 Active Delegations(s)

To simultaneously change the delegations of more than one consumer from one Enrollment Counselor to another, click on the checkbox by the consumer's name, click on the **Change Delegation** button that appears and select the **Change Delegation** option. A pop-up will appear where you can search for the new enrollment counselor to whom the selected consumers should be re-delegated.

Refine Results By (reset all)

Consumer Name

Enrollment Counselor Name

Enrollment Status


Select Enrollment Status ▾

Current Status


Select Current Status ▾

Active Since

From:


MM/DD/YYYY 

To:

MM/DD/YYYY 

GO

(0 Items Selected)

<input type="checkbox"/>	Consumer Name	Active Since	Enrollment Counselor Name	Enrollment Status	Current Status	Action
<input type="checkbox"/>	Charles Test	01/11/2019	Gregg Popovich	PENDING		
<input type="checkbox"/>	Mark Zuckerberg	01/07/2019	Gregg Popovich			